

WEEKLY PERFORMANCE SUMMARY

WEEKLY INTEGRATED NIELSEN - W/E 5/14/94

ALL OUTLETS COMBINED:

ORIGINAL

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- s versus week-ago to 46.5%, its highest level to date, as Basic and PM Private Label losses. The company's four week prior four week period to 46.4%, driven by Marlboro's week-ago to 28.5% (a record level), with the B4G1F promotion and week at retail. On a four week basis the franchise's four weeks-ago.
- unchanged versus week-ago at 9.0%, while PM's points, as PM Private Label and Basic losses were partially week-to-week at 28.6%, as losses by the company's Premium Brands' gains. However on a four week basis, the points versus four weeks-ago to 28.7% (its lowest level in over three years), with declines to both Premium and Discount brands.
- The Discount Category's weekly share declined -0.6 points versus week-ago to 31.8% (its lowest level since September 1992), with the Branded Discount segment accounting for the majority of the loss. The category's four week performance was down -0.3 points versus the prior four week period, as Private Label losses (primarily RJR) were partially offset by Branded Discount gains.

CONVENIENCE STORES (800 STORES):

- PM experienced a +0.2 point gain week-to-week to 48.4%, with Marlboro, Merit, and Cambridge gains partially offset by Basic and Private Label franchise losses. On a four week basis, PM's share increased +0.6 points versus four weeks ago to 48.3%, its highest level to date.
- Marlboro's weekly share increased +0.5 points versus week ago at 31.5%, with the B4G1F promotion accounting for the majority of the gain (up +0.4 points to 0.55%). The percent of stores with a Marlboro mail-in offer expanded to 35% this week, and incidence of a Marlboro free product offer increased +10 points to 18% of stores, reflecting implementation of Country Store POS and the B4G1F offer. On a four week basis the franchise's share expanded +0.6 points versus the prior four week period to 31.1%.
- Following three consecutive weekly gains, Basic's share declined -0.3 points versus week ago to 5.0%, as incidence of the B2G1F offer fell for the first time since mid-March (-4 points to 16% of stores). However, on a four week basis, Basic's share of industry increased +0.2 point versus four weeks ago, while its share of the Discount Category was up +0.8 points to 15.6%.
- RJR's weekly share declined -0.1 points versus week ago to 27.7%, with weekly declines by Monarch more than offsetting modest gains by its Premium franchises. On a four week basis, RJR's performance declined -0.9 points versus the prior four week period, with Doral (-0.3) and their PL franchises (-0.5) accounting for the majority of the decline.
- Following last week's "first week of the month" gain, the Discount Category's weekly share declined -0.8 points week-to-week to 32.6%, as PM PL (-0.3), Basic (-0.3), Monarch (-0.35) and GPC (-0.2) weekly losses were partially offset by a Liggett PL gain (+0.3). On a four week basis, the category declined -0.2 points versus four weeks ago, as Branded Discount gains (+0.5) were more than offset by PL losses (primarily RJR).

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